Statistics of Income Division - 90 Years of Producing Tax Statistics

Michael Udell*
Joint Committee on Taxation

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*The views expressed in this presentation are strictly my own and do not represent those of the Joint Committee on Taxation or any Member of Congress
Past

- Driving down time and costs of capturing data, providing greater detail than IRS processing
- Building capacity and processes
  - Oracle processing
  - Graphical User Interface for editing programs
  - Control of Sample Programming and Capture
- Validation
  - Verification of return data through math checks, prior year returns, and
  - Taxpayer communication
Present

- Panels
  - 1999 ABC Panel (SOCA editing)
  - 1999 Forward Panel (Without SOCA editing)
  - 1987 Family Panel
  - Estate Tax Panel

- Integration
  - Forms W-2 and 941
  - Forms 5498 and 1099-R
  - Forms 941, 1120, and 851
  - Schedule K-1 and Forms 1065 and 1120S
Present

- Emerging Data Analysis at SOI: creating measures

- Policy Analysis: researching situations
  - Single taxpayer issues: using the DIN system.
  - Multi taxpayer issues: estate tax minority discounts; corporate dividends paid to an ESOP.
Future

- 6103(a) General rule: Returns and return information shall be confidential, and except as authorized by this title, no officer or employee of the United States,…shall disclose any return or return information.

- The 6103 sandbox